

Individual Tax Return Checklist

When you come in to see us at tax – time, please bring the following items to assist us in completing your tax return quickly.

Investment related deductions

- Interest / fees on borrowing for investment purposes (bring statements)
- Asset purchase / sale agreements

Employment income deductions

- Schedule of work related expenses from ATO
- Receipts or evidence of work related deductions eg car / travel / meals

Offsets

- Sole parent / spouse / housekeeper / low income / aged parents
- Spouse contributes to superannuation
- Superannuation pension rebates
- Private health insurance statement
- Medical receipts (if spent over \$1,500)
- Imputation credit information from dividend statements

Investment Property

- Water charges
- Bank fees
- Details of when property was rented, including any rental or Agents statements
- Date when property was purchased
- capital costs
- Interest on loans

- Advertising fees
- Agent fees
- Body corporate fees
- Borrowing expenses
- Cleaning and general maintenance expenses
- council rates
- Gardening / lawn mowing fees
- Insurance premiums paid
- Land tax details

Income earned statements

- Deductable amount for pensions / annuities
- Payment summaries
- Capital Gains Tax statements
- Lump sum payments eg Eligible Termination Payment statements
- Social security, pensions, allowance statements
- Trust distribution statements
- Tax statements from Fund managers
- Bank statements from stockbrokers
- Income stream statements
- Life insurance Bonus Policy statements

Other deductions

- Superannuation if self employed

- Receipts of gifts / donations to charity
- Receipts of self education expenses
eg books, computer costs, car
expenses
- Financing lease statements
- Income Protection premiums (bring
statements)

Other useful information

- Credit card statement
- Bank statements (with account name
& number, BSB number)
- Cheque butts
- Loan statements
- Previous years accountants fees
- Last years tax return
- Prior years tax losses
- Any tax credit vouchers